



Register for an NSF Account to Begin Using FastLane and Research.gov



To submit proposals to the National Science Foundation (NSF) and conduct other award-related activities using NSF systems, you must have an NSF ID. This ID is a unique numerical identifier assigned to users by NSF through the registration process outlined below. Follow the step-by-step process to create a new NSF account.

Step 1: Confirm you do not have an existing NSF account

- Access the [NSF ID Lookup](#) page to search for an existing NSF account.
- If you forgot your password for an established NSF account, [click here](#) to retrieve it. Note that your email address can only be associated with one NSF account.
- If you do have an existing NSF account and you know your password, you can edit your account profile information by selecting the “My Profile” option located on the top right of [Research.gov](#) homepage. [Click here](#) for detailed information on “My Profile” functions.
- If you do not have an existing NSF account, proceed to Step 2.

Step 2: Access the Account Registration page

- Open [Research.gov](#)
- Click “Register” located at the top of the screen. (Figure 1)



Figure 1

Step 3: Create a new NSF account

- Input the requested account registration information (Figure 2)

Figure 2

Important Note: Your primary email address will be used for NSF account notifications including password resets. Please make sure you have ongoing access to this email account (e.g., Google email). It is critical that you have continued access to this email account, even if you were to ever change organizations.

- Check the boxes to confirm you are not a robot and that you are at least 13 years of age. (Figure 2)
- Click “Save & Preview.” (Figure 2)
- Verify that your account registration information is correct on the Preview Account Registration screen and then click “Submit.” (Figure 3)
- You will receive an Account Registration Confirmation on the screen. (Figure 4)
- Check the primary email account that you just used for two messages: one containing your new NSF ID and another containing your temporary password.
- Click “Sign In” on [Research.gov](#) and enter your new NSF ID and temporary password. (Figure 1)
- Follow the instructions to change your temporary password.
- You have successfully registered for a new NSF account!

Figure 3

Figure 4

Step 4: Add a New Role

- Now that you have an NSF account, you can add roles to your account profile. [Click here](#) for detailed instructions.



Working at Multiple Organizations or Moving to Another Organization



It is National Science Foundation (NSF) policy that only one NSF account is allowed per user. If you already have an NSF account, you should NOT register for a new NSF account if you are working at multiple organizations, moving to another organization, or working as an Unaffiliated Principal Investigator (PI). Instead, you can add roles to your existing NSF account.

You do NOT need a separate NSF account for each organization you are affiliated with or a new NSF account when moving to a new organization or working as an Unaffiliated PI

- You can have multiple organizations associated with your NSF account, and you can add new roles from different organizations to your existing NSF account.
 - For more information about adding a role from a new organization or adding the Unaffiliated Principal Investigator role, [click here](#).
- If you are associated with multiple organizations, be sure to update your designated Primary Organization on the “View My Roles” page. For more information on changing your Primary Organization, [click here](#).
- If you are leaving an organization, make sure the primary email address on your NSF account profile is set to an email address you will continue to have access to after your departure (e.g., Google email address). For more information on editing your NSF account profile, [click here](#).

Figure 1

Adding a PI role at a new organization to your existing NSF account

- Click “**Sign In**” located at the top right of [Research.gov](#) page.
- Enter your NSF ID and password and click “**Sign In**.”
- Click “**My Profile**” located at the top right of the screen.
- Click “**Add New Role**” from the left navigation bar.
- To request the Investigator role, click the blue “**Add Investigator or Authorized User Role**” button located in the “Prepare Proposals and Manage Awards” box and a five-step role request wizard will display. (Figure 1)
- Select “**Yes, prepare and manage proposals with an organization**” and click “**Submit.**” (Figure 2)

Figure 2

Step 1: Find Organization

- Enter the organization’s DUNS number and click “**Search**” (Figure 3). If you already have an organization-approved role at NSF you may select the DUNS number associated with your existing organization from the dropdown menu.
- Verify the correct organization is displayed and click “**Next.**”

Note: For more information about DUNS numbers, please [click here](#) or contact your Sponsored Projects Office (SPO).

Figure 3



Step 2: Add Information

- Complete the required fields denoted by a red asterisk (*) and click “**Next.**” (Figure 4)

Step 3: Choose Role(s)

- The “Principal Investigator” role is pre-selected. Click “**Next.**” (Figure 5)

Step 4: Review

- Review your information for accuracy and click “**Next**” (Figure 6)

Step 5: Confirmation

- Your role request is sent to the listed Organizational Contacts for review and approval (Figure 7)
- You have successfully submitted a role request!



Helpful Tips

- Your primary email address is used for notifications about your NSF account such as password resets.
- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be prepopulated if you already have a Principal Investigator (PI) role at another organization. If you update this section, the change will be reflected in your PI role at all organizations.
- By default, the latest PI role will be set to primary.

Figure 4

Figure 5

Figure 6

Organization Contact(s)	Organization Contact Type
Richard/Name Test/Name	Administrator
LORAIN DRISCOLL	SAM POC
RDAL PRICE	SAM POC
DICK WATT	SAM POC

Figure 7



Navigating the Account Management Links



The Account Management system includes pages for Administrators to manage user and organization information and pages for users to self-manage their roles and profile information. Access these pages and the updated functionality by signing in to [Research.gov](https://research.gov) and clicking on the “My Profile” link in the top right.

Access the left navigation bar in Account Management

- Open [Research.gov](https://research.gov)
- Click “**Sign In**” located at the top right of the screen. (Figure 1)
- Enter your NSF ID and password and click “**Sign In.**” (Figure 2)
- Click on “**My Profile**” located at the top right of the screen. (Figure 3)



Figure 1

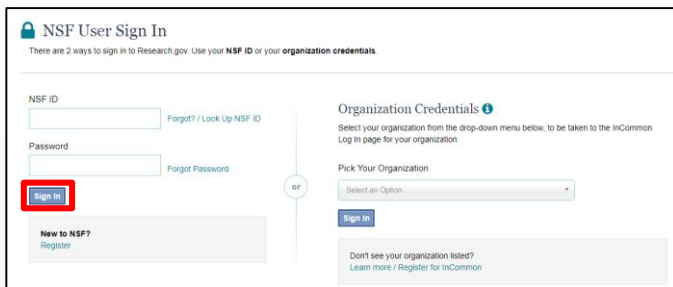


Figure 2



Figure 3

Where do the left navigation bar links take me?

Account Management Link	Functionality
My Profile / View/Edit My Profile	View and edit your profile information
View My Roles	View pending and active roles, and edit organizational contact information
Add a New Role	Request a new role from an organization such as a Principal Investigator role.
View My Users	<i>You will only see this link if you're an Administrator of an organization.</i> Approve and disapprove role requests, add and remove user roles, add and remove users from your organization, and invite users to create an NSF account so they can join your organization
About Account Management	Access job aids, instructional videos, and FAQs to guide you through the new Account Management functionality
Proposals, Awards, & Status	Access the FastLane Proposals, Awards, & Status page. This page will open in a new tab.
Research Administration	Access the FastLane Research Administration page. This page will open in a new tab.



View and Edit My NSF Account Profile Information



Once you have a National Science Foundation (NSF) account, you can view and edit your account profile information at any time on your own via the View/Edit My Profile page. Follow the step-by-step instructions below to update your account information including contact information, ORCID iD, and account password.

Step 1: Access the View/Edit My Profile page

- Open [Research.gov](https://research.gov)
- Click “Sign In” located at the top right of the screen. (Figure 1)
- Enter your NSF ID and password and click “Sign In.” (Figure 2)
- Click “My Profile” from the top right of the screen. (Figure 3)
- Click “View/Edit My Profile” located on the left navigation bar. (Figure 4)



Figure 1

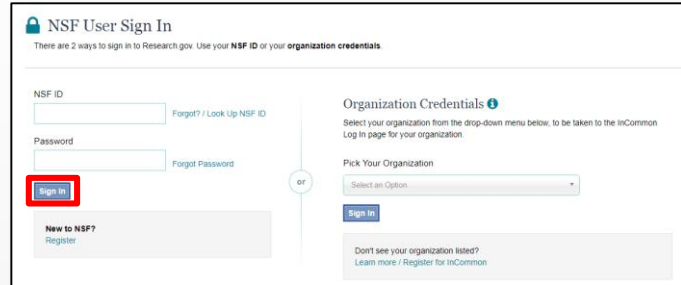


Figure 2

Step 2: Edit your NSF account profile information or ORCID iD

- Click “Edit” at the bottom of the page. (Figure 5)
- Enter your updated information and click “Save.” (Figure 6)

Important Note: If you change your primary email address (i.e., the email address used to create your NSF account), NSF will send you a verification email. You must verify the updated email address within four hours or your account email address will revert back to your last verified email address.



Figure 3

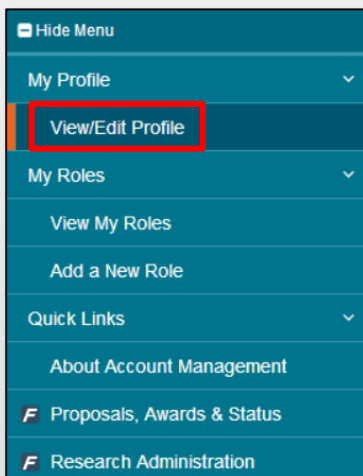


Figure 4

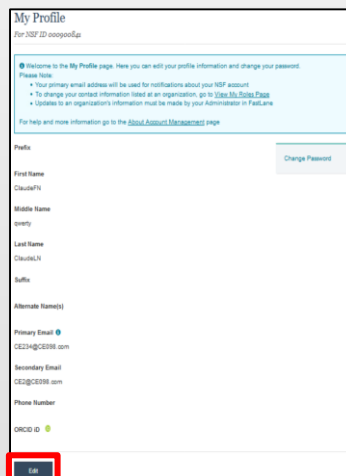


Figure 4

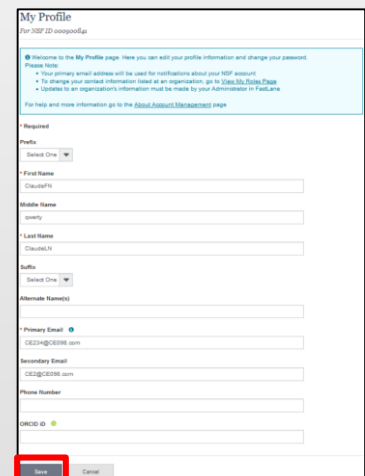


Figure 5



Helpful Tip

To ensure compliance with NSF’s policy of allowing only one NSF account per user, you will not be able to save any email addresses to your account profile that are associated with another NSF account.



What do I do if I accidentally delete the verification email sent by NSF?

- Select the **“View/Edit My Profile”** option. (Refer to Step 1 on the previous page)
- Click **“Pending Your Verification”** located to the right of the primary email address. (Figure 6)
- Select **“Click here to Resend the verification link email.”** (Figure 7)
- A new verification email will be sent to your pending primary email address (i.e., the updated email address entered in Step 2 on the previous page).

Important Note: NSF will send you a verification email. You must verify the updated email address within four hours or your account email address will revert back to your last verified email address.

If the four hours have passed, the resend verification email option will not be available and you will need to restart the process by updating your email address again. (Refer to Step 2 on the previous page)

How do I change my password?

- Select the **“View/Edit My Profile”** option (Refer to Step 1 on the previous page)
- Click **“Change Password”** located on the right side of the screen. (Figure 7)
- Update your password and click **“Change Password.”** (Figure 8)
- Once your password is successfully changed, you will receive a password change notification on the screen. (Figure 9)
- You have successfully changed your password!
- Click **“Continue to Research.gov”** to keep working. (Figure 9)

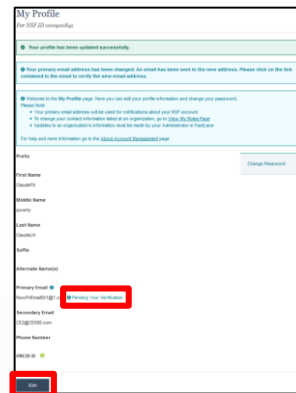


Figure 6

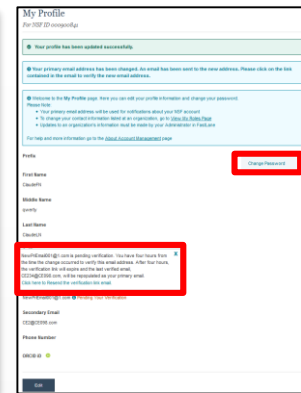


Figure 7

Change Password

For Research.gov and FastLane

Enter your temporary password as received to change your password.

Enter your current password and then create a new password.

NSF ID

Current Password

New Password

Confirm Password

Change Password

Cancel

Your password needs to:

- Have at least 8, but no more than 20 characters
- Avoid using spaces
- Meet 3 of the 4 rules:
 - At least one lowercase letter
 - At least one capital letter
 - At least one number
 - At least one of the permitted special characters # & % ! @ ()

Note: you cannot re-use your last 6 passwords

Figure 8



Helpful Tip

Passwords are valid for 365 days before required renewal.

Change Password

For Research.gov and FastLane

Success - Password Changed

Your password has been successfully changed in Research.gov and FastLane.

In the future, if you need to change your password, click the “My Profile” link on the top right of the page and select “Change Password”.

Continue to Research.gov

Continue to FastLane

Note: Most FastLane functions can be reached directly from Research.gov, without the need to sign in again.

Figure 9



Register a New Organization



Organizations must be registered with the National Science Foundation (NSF) to submit proposals using NSF's systems. Before a new organization can register with NSF, it must first be registered in the System for Award Management (SAM) - <https://www.sam.gov> and have a DUNS number. Note that completion of the SAM registration process may take up to two weeks.

Follow the step-by-step process below to register a new organization with NSF.

How do I register a new organization with NSF?

- Open [Research.gov](https://www.research.gov)
- Click **"Sign In"** located at the top right of the screen.
- Enter your NSF ID and password and click **"Sign In."**
- Click **"My Profile"** located at the top right of the screen.
- Click **"Add New Role"** from the left navigation bar.
- Click **"Add Organizational Role"** located in the **"Add and Manage Organizations"** box. (Figure 1).
 - **Note:** If an organization is new to NSF, you must start the process by setting yourself up as the Administrator for the new organization. You must have an NSF account to start this process. The system will automatically detect that the organization is new and will walk you through setting up the organization and Administrator role.
- Enter your organization's DUNS number and click **"Search."** If your organization is not already registered with NSF, a message will display to confirm that the organization is not found in NSF systems and you will be able to register the organization and become the first Administrator. (Figure 2)
 - If you need help registering in the System for Award Management (SAM), go to https://www.sam.gov/sam/transcript/Quick_Guide_for_Grants_Registrations.pdf.
- Note that completion of the SAM registration process may take up to two weeks.

Figure 1

Figure 2



Helpful Tip

If a new organization is registered with NSF without an Administrator, the first user to request a role will become the organization's first Administrator.



How do I register a new organization with NSF?

- Enter your contact information for the Administrator role, add your organization's information, and then click **"Next."** (Figure 3)
- Notice the "Administrator" role is pre-selected. Click **"Next."** (Figure 4)
- Review your organization's information for accuracy and click **"Submit."** (Figure 5)
- The request to register your organization with NSF will be forwarded via email to your organization's SAM points of contact for their information only. The SAM points of contact will not need to approve the request. (Figure 6)



Helpful Tip

Once an organization is registered with NSF, any updates to organizational information must be made by an organizational Administrator in the FastLane Research Administration module.

Add a New Role to Add and Manage Organizations

1. Find Organization ✓ 2. Add Information 3. Choose Role(s) 4. Review 5. Confirmation

Add Information

The contact information will be used for all communications when performing in approved roles for this organization

* Required

Your Contact Details

* Work Phone

* Work Email

Organization Details

* Organization Short Name

* Organization Type

* Time Zone

* Organization Phone Number

Organization Fax Number

* Organization Email

Previous Next

Figure 3

Add a New Role to Add and Manage Organizations

1. Find Organization ✓ 2. Add Information ✓ 3. Choose Role(s) 4. Review 5. Confirmation

Due to your selected organization, you will be registered for the following role:

☒ Administrator (Manage Roles)

Previous Next

Figure 4

Add a New Role to Add and Manage Organizations

1. Find Organization ✓ 2. Add Information ✓ 3. Choose Role(s) ✓ 4. Review 5. Confirmation

Review

Your Contact Details

Organization Name: PLATING FOR ELECTRONICS, INC.

Role: Administrator

Work Email: RRWemail@RRWemail.com

Work Phone Number: 1111111111

Organization Details

Organization Short Name: 123

Organization Type: Work Through 12th Grade (Public, State)

Time Zone: America/Phoenix (GMT-7:00)

Organization Phone Number: 1231231231

Organization Fax Number:

Organization Email: 123@123.com

Previous Submit

Figure 5

Add a New Role to Add and Manage Organizations

1. Find Organization ✓ 2. Add Information ✓ 3. Choose Role(s) ✓ 4. Review ✓ 5. Confirmation

Success - your request has been forwarded to the point(s) of contact below. Check the status of this request on the View My Roles page.

Show 5

Point(s) of Contact	POC Type
STEPHEN DAVINO	SAM POC
CORE DAVINO	SAM POC

Continue to My Profile >

Add Additional Roles >

Figure 6



Add a New Role



To work on proposal and award activities on National Science Foundation (NSF) systems, a user must have an organization-approved role at an organization registered with NSF. To request a role from your organization, you must sign in to [Research.gov](#) and select the “**My Profile**” link located on the top right of the screen. Select the “**Add a New Role**” option from the left navigation bar. After requesting a role, your organization’s Administrator will receive the request electronically to approve or disapprove it.

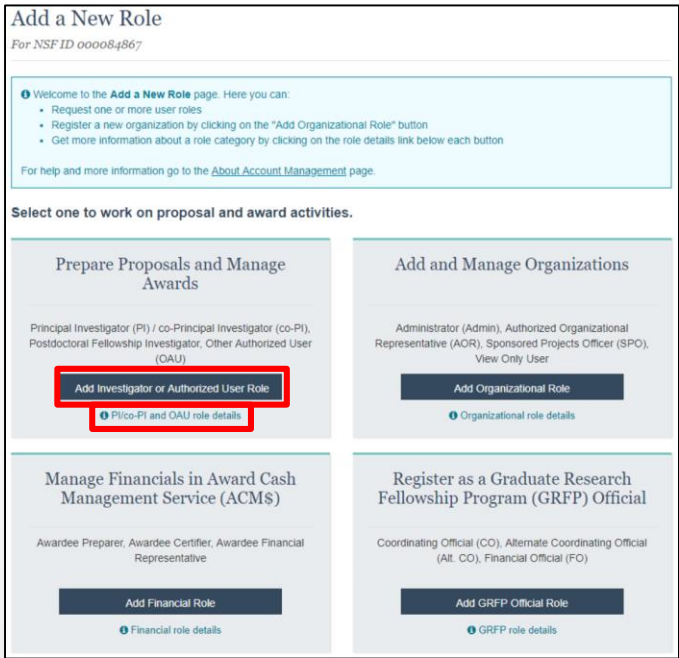


Figure 1

Figure 1 shows the four role categories: Investigator, Organizational, Financial, and GRFP Official. Users should click the appropriate dark blue **Add Role** button (e.g., **Add Investigator or Authorized User Role** to request a PI role) to request the specified role and to proceed with the five-step role wizard. Note that beneath each dark blue **Add Role** button, there is an information link (e.g., PI/co-PI and OAU role details) which provides additional information about the specific role. The table below outlines the role request options grouped by category.

If you need this role(s)	To perform these functions	Select this “Add Role” Button
<ul style="list-style-type: none">Principal Investigator (PI)Co-Principal Investigator (co-PI)Unaffiliated Fellowship Principal Investigator	<ul style="list-style-type: none">Prepare proposalsManage awards	Add Investigator or Authorized User Role
<ul style="list-style-type: none">AdministratorSponsored Projects Officer (SPO)Authorized Organization Representative (AOR)View Only	<ul style="list-style-type: none">Add a new organizationApprove/disapprove rolesAssign user rolesAdd/remove users	Add Organizational Role
<ul style="list-style-type: none">Awardee PreparerAwardee CertifierAwardee Financial Representative	<ul style="list-style-type: none">Prepare and manage financials in Award Cash Management Service (ACM\$)	Add Financial Role
<ul style="list-style-type: none">Graduate Research Fellowship Program (GRFP) Coordinating Official (CO)GRFP Alternate Coordinating Official (Alt. CO)GRFP Financial Official (FO)	<ul style="list-style-type: none">Manage GRFP functions	Add GRFP Official Role
<ul style="list-style-type: none">Other Authorized User (OAU)	<ul style="list-style-type: none">Assist a PI with proposal preparation	Add Investigator or Authorized User Role



Role Request Wizard Steps

No matter the role you choose to add, the same five-step process is followed.

Step 1: Find Organization

- Enter your organization's DUNS number and click **"Search"** (Figure 2). If you already have an organization-approved role at NSF, you can use the dropdown menu to select the DUNS number associated with your NSF-registered organization.

- Verify the correct organization is displayed in the results section and click **"Next."** (Figure 2)

Note: For more information about DUNS numbers, please [click here](#) or contact your Sponsored Projects Office (SPO).

- If your organization is not registered in the System for Award Management (SAM) go to <https://www.sam.gov>. Note that completion of the SAM registration process may take up to two weeks.

Figure 2

Step 2: Add Information

- Enter your work phone number. Use the dropdown menu to select a current work email address or add a new work email address. Then click **"Next."** (Figure 3)

Note: If you are requesting a *Principal Investigator* role, you will need to enter additional data. Please see the following job aids for detailed instructions: [Add a New Role – Principal Investigator and Add a New Role – Unaffiliated Principal Investigator](#).

Figure 3



Helpful Tips

Each NSF account requires a primary email address and a work email address.

- Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., Google email address), even if you change organizations.
- Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



Step 3: Choose Role(s)

- Select a role(s) and click “Next.” (Figure 4)

Note: Depending on the selected role, please be aware that some corresponding roles will also be automatically added. For example, if you select the Administrator role, the Sponsored Projects Officer role and the View Only role will automatically be added to your profile.

Figure 4

Step 4: Review

- Review your information for accuracy and click “Next.” (Figure 5)

Figure 5

Step 5: Confirmation

- Your role request(s) are sent to the Administrators that are in the Organization Contacts list for review and approval (Figure 6).
- You have successfully submitted your role request(s)!

Figure 6



Helpful Tips

An email will be sent to the work email address you used to request a role on whether or not your role is approved or disapproved by your organization. You may reach out to the Administrator listed as one of the organization contacts, located on View My Roles page, to follow-up on your role request.



Add a New Role - Principal Investigator PI/Co-PI



To work on proposal and award-related activities on National Science Foundation (NSF) systems, a Principal Investigator (PI)/ co-Principal Investigator (co-PI) must have the Investigator role at an organization. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it. To request a role, you need to sign in to [Research.gov](https://www.research.gov) and select the **"My Profile"** link located on the top right of the screen. Select the **"Add a New Role"** option from the left navigation bar.

Access the Add New a Role page

- To request the Investigator role, click the blue **"Add Investigator or Authorized User Role"** button located in the "Prepare Proposals and Manage Awards" box and a five-step role request wizard will display. (Figure 1)
- Select **"Yes, prepare and manage proposals with an organization"** and click **"Submit."** (Figure 2)

Figure 1

Figure 2

Five-Step Role Wizard

Step 1: Find Organization

- Enter the organization's DUNS number and click **"Search"** (Figure 3). If you already have an organization-approved role at NSF you may select the DUNS number associated with your existing organization from the dropdown menu.
- Verify the correct organization is displayed in the results section and click **"Next."**

Note: For more information about DUNS numbers please [click here](#) or contact your Sponsored Projects Office (SPO).

Figure 3



Step 2: Add Information

- Complete the required fields denoted by a red asterisk (*) and click “**Next.**” (Figure 4)

Step 3: Choose Role(s)

- The “Principal Investigator” role is pre-selected. Click “**Next.**” (Figure 5)

Step 4: Review

- Review your information for accuracy and click “**Next**” (Figure 6)

Step 5: Confirmation

- Your role request is sent to the listed Organization Contacts for review and approval (Figure 7)
- You have successfully submitted a role request!

Figure 4

Figure 5



Helpful Tips

- Your primary email address is used for notifications about your NSF account such as password resets.
- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be prepopulated if you already have a Principal Investigator (PI) role at another organization. If you update this section, the change will be reflected in your PI role at all organizations.
- By default, the latest PI role will be set to primary.

Figure 6

Organization Contact(s)	Organization Contact Type
Richard/Name Tester/Name	Administrator
LORRAINE DRISCOLL	SAM POC
RDAL E PRICE	SAM POC
DICK WATT	SAM POC

Figure 7



Add a New Role – Unaffiliated / Postdoctoral Fellowship Principal Investigator



To work on proposal and award-related activities on National Science Foundation (NSF) systems, you must have an Investigator role even if you are working independently and are not affiliated with an organization. To request an Investigator role, you need to sign in to [Research.gov](https://research.gov) and select the “My Profile” link located on the top right of the screen. Then select the “Add a New Role” option from the left navigation bar.

Access the Add a New Role page

- To request the Investigator role, click the blue “**Add Investigator or Authorized User Role**” button located in the “Prepare Proposals and Manage Awards” box and a three-step process will display. (Figure 1)
- Select “**No, prepare and manage proposals independently (e.g. Unaffiliated or post-doctoral fellowship)**” and click “**Submit.**” (Figure 2)

Three-Step Role Wizard

Step 1: Add Information

- Input data into all required fields that have a red asterisk (*) and click “**Next.**” (Figure 3)

Figure 1

Figure 2



Helpful Tips

- The second option in the “Prepare Proposals and Manage Awards” modal box (Figure 2) is disabled if you already have an Unaffiliated PI role. To view your current Unaffiliated PI role information, click on “**View My Roles**” and refer to the Active Roles table.
- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be prepopulated if you already have a Principal Investigator (PI) role at any other organization. If you update this section, the change will be reflected in your PI role at all organizations.
- By default, the latest PI role will be set to primary.

Figure 3



Step 2: Review

- Review your information for accuracy and click **“Submit.”** (Figure 4)

Unaffiliated PI

Review your information for accuracy

Organization Name: Elton, Claude
Role: Unaffiliated Principal Investigator

Your Contact Details
Work Phone Number: 2342425555
Work Email: Claude7575@t.com

Your Degree Information
Degree Type: Bachelor of Agriculture
Degree Year: 2009

Your Work Address
Country: American Samoa
Time Zone: Pacific/Pago_Pago
Street Address: 1
Street Address (Line 2): 2
City: 3
Postal Code: 444444

Previous Submit

Figure 4

Step 3: Confirmation

- You have successfully added the Unaffiliated Principal Investigator role! (Figure 5)

Unaffiliated PI

Success! You may now independently prepare proposals or submit post-doctoral fellowship proposals.

[Continue to My Profile >](#)
[Add Additional Roles >](#)

Figure 5



View My Roles – Requested Role(s)



The View My Roles page shows the roles you have requested that are pending approval or disapproval from your organization’s Administrator as well as your existing approved roles. You may view Organization Contact(s) and edit your organization contact information by following the step-by-step process below.

Access the View My Roles page

- Open Research.gov
- Click **“Sign In”** located at the top right of the screen.
- Enter your NSF ID and password and click **“Sign In.”**
- Click **“My Profile”** located at the top right of the screen.
- Click **“View My Roles”** from the left navigation bar.

Requested Role(s)			
Organization Name	Work Phone	Work Email	Action
University of Washington	789-789-7897	Claude7575@1.com	Edit Your Contact Info See Org Contact(s)

Role(s)	Date Added
Sponsored Projects Officer (SPO)	01/22/2018

Figure 1

How do I change my organization contact information for a non-Principal Investigator role?

- Locate the organization and click **“Edit Your Contact Info”** in the “Action” column located on the right side of Requested Role table (Figure 1)
- Users who have non-Principal Investigator roles will see the screen depicted in Figure 2 and can edit their work phone number and work email address. Then click **“Save.”** (Figure 2)

Edit

Your information for Florida State University.
NSF account information is located on [My Profile](#).

* Required

* Work Phone Number

8888888888

* Work Email

claudio11@claudio11.com

Save Cancel

Figure 2



Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
 - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
 - Sort data in ascending or descending order by clicking the arrows located next to the column names.
 - Expand and collapse the organization name to display and hide roles.
- Each NSF account requires a primary email address and a work email address. (Figures 2 and 3)
 - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., Google email address), even if you change organizations.
 - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



How do I change my organization contact information for a Principal Investigator role?

- Locate the organization and click **“Edit Your Contact Info”** in the “Action” column located on the right side of Requested Role table (Figure 1 on previous page)
- Users who have an affiliated Principal Investigator role will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work address. Then click **“Save.”**

Who do I contact at my organization for role request questions?

- Locate the organization and click **“See Org Contact(s)”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 4)

The 'Edit' form contains the following sections:

- Your Contact Details:** * Work Phone Number (7039840341), * Work Email (test_user2@tester.com)
- Your Degree Information:** * Degree Type (Master of Information Systems), * Degree Year (2008)
- Your Work Address:** * Country (United States), * Street Address (10001 test dr.), Street Address (Line 2) (line 2), Department Name, * City (herndon), * State (Virginia), * Postal Code (20171)

Buttons: Cancel, Save (highlighted with a red box)

Figure 3



Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figure 2 on previous page & Figure 3)
 - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., Google email address), even if you change organizations.
 - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

Organization Contact(s)

Show 5

showing 1-5 of 34 < Prev 1 2 3 4 5 Next >

Organization Contact(s)	Organization Contact Type
Debra Callaway	Administrator
Jasmine Campbell	Administrator
Lisa Cantore	Administrator
Nicky Choi	Administrator
Autumn Eck	Administrator

showing 1-5 of 34 < Prev 1 2 3 4 5 Next >

Figure 4



View My Roles – Active Role(s)



The View My Roles page shows the roles you have requested that are pending approval or disapproval from your organization's Administrator as well as your existing approved roles. You may view Organization Contact(s) and edit your organization contact information by following the step-by-step process below. You may set your Primary Organization designation if you have a Principal Investigator role at an organization or you are a Unaffiliated Principal Investigator.

Access the View My Roles page

- Open [Research.gov](https://research.gov)
- Click **"Sign In"** located at the top right of the screen.
- Enter your NSF ID and password and click **"Sign In."**
- Click **"My Profile"** located at the top right of the screen.
- Click **"View My Roles"** from the left navigation bar.

Active Role(s)			
Organization Name	Work Phone	Work Email	Action
Elton, Claude (PI Primary Organization)	234-242-5555	Claude7575@1.com	Edit Your Contact Info See Org Contact(s)

Role(s)	Date Added
Unaffiliated Principal Investigator	01/22/2018 <input checked="" type="checkbox"/> Primary Organization

Figure 1

How do I change my organization contact information for a non-Principal Investigator role?

- Locate the organization and click **"Edit Your Contact Info"** in the "Action" column located on the right side of Requested Role table (Figure 1)
- Users who have non-Principal Investigator roles will see the screen depicted in Figure 2 and can edit their work phone number and work email address. Then click **"Save."** (Figure 2)

Edit

Your information for Florida State University.
NSF account information is located on [My Profile](#).

* Required

* Work Phone Number

8888888888

* Work Email

claudio11@claudio11.com

Figure 2



Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
 - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
 - Sort data in ascending or descending order by clicking the arrows located next to the column names.
 - Expand and collapse the organization name to display and hide roles.
- Each NSF account requires a primary email address and a work email address. (Figures 2 and 3)
 - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., Google email address), even if you change organizations.
 - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



How do I change my organization contact information for a Principal Investigator role?

- Locate the organization and click **“Edit”** in the “Action” column located on the right side of Requested Role table (Figure 1 on previous page)
- Users who have an affiliated Principal Investigator role will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work address. Then click **“Save.”**

Who do I contact at my organization for role request questions?

- Locate the organization and click **“See Org Contact(s)”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 4)

Edit

Your contact information for University of Washington
Account information is located on My Profile

Your Contact Details

* Work Phone Number: 7039840341

* Work Email: test_user2@tester.com

Your Degree Information

* Degree Type: Master of Information Systems

* Degree Year: 2008

Your Work Address

* Country: United States

* Street Address: 10001 test dr.

Street Address (Line 2): line 2

Department Name:

* City: herndon

* State: Virginia

* Postal Code: 20171

Cancel Save

Figure 3



Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figures 2 and 3)
 - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., Google email address), even if you change organizations.
 - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

Organization Contact(s)

Show 5

showing 1-5 of 34 < Prev 1 2 3 4 5 Next >

Organization Contact(s)	Organization Contact Type
Debra Callaway	Administrator
Jasmine Campbell	Administrator
Lisa Cantore	Administrator
Nicky Choi	Administrator
Autumn Eck	Administrator

showing 1-5 of 34 < Prev 1 2 3 4 5 Next >

Figure 4



How do I set an organization as my Primary Organization for proposal submissions?

- **Prerequisites:** You must have either an approved Principal Investigator (PI) role with an organization or an Unaffiliated Principal Investigator role before you can designate a Primary Organization.
 - If you don't have a Principal Investigator role and would like to add one, [click here](#).
- Open the **“View My Roles”** page and locate the Active Role(s) table. (Figure 5)
- Locate the organization where you have an approved PI role that you would like to set as your Primary Organization. (Figure 5)
- If your roles at the organization are not already expanded, click on the plus sign next to the organization name to expand the row. (Figure 5)
- Locate the Principal Investigator role. (Figure 5)
- Select the **“Primary Organization”** checkbox located to the right of the Date Added field. (Figure 5)
- Notice the green check mark and “PI Primary Organization” label under the organization name. (Figure 5)
- You now have set the organization as the Primary Organization. The Primary Organization is the default for your proposal submissions.

Active Role(s)			
Organization Name	Work Phone	Work Email	Action
<div><div></div><div>FARISH JACKSON REHABILITATION ... ✓(PI Primary Organization)</div></div>	301-010-1101	cars1603@tester.com	Edit Your Contact Info See Org Contact(s)
Role(s)		Date Added	
Awardee Financial Representative		01/11/2018	
Principal Investigator / co-Principal Investigator (PI)		11/14/2017	<input checked="" type="checkbox"/> Primary Organization ⓘ
Administrator (Admin)		11/03/2017	

Figure 5



Helpful Tips

- You can only have one Primary Organization.
- Only PIs need to select a Primary Organization.
- By default, the latest PI role added to your profile (including an Unaffiliated PI role) will become the Primary Organization



View My Users – Administrator Dashboard



The View My Users page is a dashboard for the organization Administrator to view the organization's pending role requests and manage user tables. Via this dashboard, the Administrator is able to approve or disapprove role requests, add or remove current user roles, add current NSF users to the organization, invite users to create NSF accounts, and invite current users to update their profile information.

Access the View My Roles page

- Open [Research.gov](https://research.gov)
- Click **"Sign In"** located at the top right of the screen.
- Enter your NSF ID and password and click **"Sign In."**
- Click **"My Profile"** located at the top right of the screen.
- Click **"View My Users"** from the left navigation bar.

How do I approve or disapprove a role request from a user?

- View the "Pending Role Requests" table. (Figure 1)
- For each user role request, click "Approve" to accept a user's request or "Disapprove" to reject a user's request. (Figure 1)
- Approved role requests will now appear in the "Manage User Roles" table. (Figure 2)

Name	Role	Organization Name	Work Email	Date Requested	Action
Claude Elton	Sponsored Projects Officer	University of Washington	Claude7575@1.com	01/22/2018	Approve Disapprove

Figure 1

Name	Organization Name	Work Phone	Work Email	Action
ClaudeFN ClaudeLN	University of Washington	555-555-5555	UPL_RRW_email@email.com	Manage Roles Remove User

Figure 2

How do I add or remove user roles?

- View the **"Manage User Roles"** table. (Figure 2)
- Click **"Manage Roles"** located in the Action column on the right side of the table. (Figure 2)
- Select the appropriate role(s) to assign or remove from the user and click **"Save."** (Figure 3)
 - **Caution:** Deselecting all roles for a user will remove the user from the organization. (Figure 3)
 - If another user has the Coordinating Official (CO) role, the system will display the current CO's name. (Figure 3)
 - If a user has not entered the required Principal Investigator Degree Information, work email and work phone number for the specified organization, an "Info Needed" icon will be displayed next to their name and PI role on the user's View My Roles page and also on the Administrator's View My Users page.

The user must input and save the required information by clicking on the "Edit Your Contact Info" link located in the Active Roles table.

Roles for Claude Elton at University of Washington

Prepare Proposals and Manage Awards

- ☐ Principal Investigator (PI/co-PI)
- ☐ Other Authorized User (OAU)

Manage Organizations

- ☐ Administrator (Admin)
- ☐ Authorized Organizational Representative (AOR)
- ☐ Sponsored Projects Officer (SPO)
- ☒ View Only

Manage Financials in Award Cash Management Service (ACMS)

- ☐ Awardee Preparer
- ☒ Awardee Certifier
- ☒ Awardee Financial Representative

Graduate Research Fellowship Program (GRFP) Official

- ☒ Coordinating Official (CO) [currently ab tester lastnm tester]
- ☐ Alternate Coordinating Official (Alt. CO)
- ☐ Financial Official (FO)

Save **Cancel**

Figure 3

Name	Organization Name	Work Phone	Work Email	Action
Claude Elton	IDAHO FRESH COOPERATIVE INC		c@c1.com	Manage Roles Remove User

Figure 4



How do I add an existing NSF user as a new user at my organization?

- View the “**Manage User Roles**” table. (Figure 5)
- Click “**Add User.**” (Figure 5)
- Enter an NSF ID or email address and click “**Search.**” (Figure 6)
- Ensure the intended user name appears.
 - If you are an Administrator for multiple organizations, select an organization from the dropdown menu. (Figure 7)
- Click “**Continue.**” (Figure 7)
- Select the appropriate role(s) to assign to the user (Figure 8)
 - **Note:** If the user already has pre-selected roles, this means the user has already been added to your organization. In this case, you may edit the user’s roles and click “**Add User.**” (Figure 8)
 - If a user does not have the required Principal Investigator Degree Information associated to their NSF account and/or does not have a work email address and a work phone number associated with the organization, an “Info Needed” icon will appear next their name and PI role. In addition, this icon will display on the user’s View My Roles page. The user must input and save the required information by clicking on the “Edit Your Contact Info” link located in Active Roles table.
 - **Caution:** Deselecting all roles for a particular user will remove the user from the organization. (Figure 8)
 - If another user has the Coordinating Official (CO) role, the system will display that current CO’s name. (Figure 8)

Name	Organization Name	Work Phone	Work Email	Action
University of Washington				
Invite to Update Profile				
Role(s)	Date Added			
Not Onboarded				

Figure 5

Step 1 of 2: Search for User

NSF ID OR Email

Figure 6

Step 1 of 2: Search for User

NSF ID OR Email

Name	NSF ID	Email
Claude1122333 C Claude2233	000900752	c*****@*****.com

Select Organization

Select an organization to assign the role to

Figure 7

Step 2 of 2: Roles for Claude1122333 ClaudeMid123 Claude2233 at INJECTRONICS, INC.

Prepare Proposals and Manage Awards

☐ Principal Investigator (PI/co-PI) ⓘ

☒ Other Authorized User (GAU) ⓘ

Manage Organizations

☐ Administrator (Admin) ⓘ

☒ Authorized Organizational Representative (AOR) ⓘ

☒ Sponsored Projects Officer (SPO) ⓘ

☒ View Only ⓘ

Manage Financials in Award Cash Management Service (ACMS)

☒ Awardee Preparer ⓘ

☒ Awardee Certifier ⓘ

☒ Awardee Financial Representative ⓘ

Graduate Research Fellowship Program (GRFP) Official

☒ Coordinating Official (CO) ⓘ

☐ Alternate Coordinating Official (Alt. CO) ⓘ

☐ Financial Official (FO) ⓘ

Figure 8



Helpful Tip

To add a user to an organization or to add a roles to a user, the user must have an updated profile. A user can only update their profile if they have successfully migrated their account and updated their primary email address and phone number.



How do I invite a user at my organization to update their profile so I can add/remove their roles?

- Locate the “**Manage User Roles**” table. (Figure 9)
- Click “**Invite to Update Profile**” located in the Action column. (Figure 9)
- An email will be sent to the user informing them to update their profile.

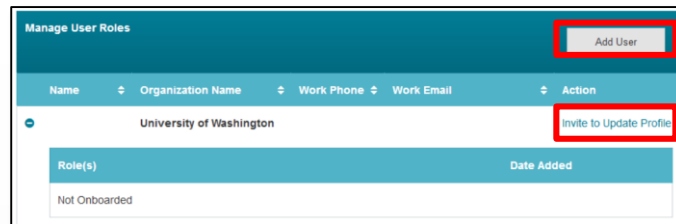


Figure 9

How do I invite a staff member at my organization who does not have an NSF account to register for an NSF account so that I may add them as a user on my organization’s dashboard?

- Locate the “**Manage User Roles**” table. (Figure 9)
- Click “**Add User**.” (Figure 9)
- Enter an email address and click “**Search**.” (Figure 10)
- Ensure the correct email address appears. (Figure 10)
 - If you’re an Administrator at multiple organizations, select an organization to invite the user. (Figure 10)
- Click “**Invite to Register**.” (Figure 10)

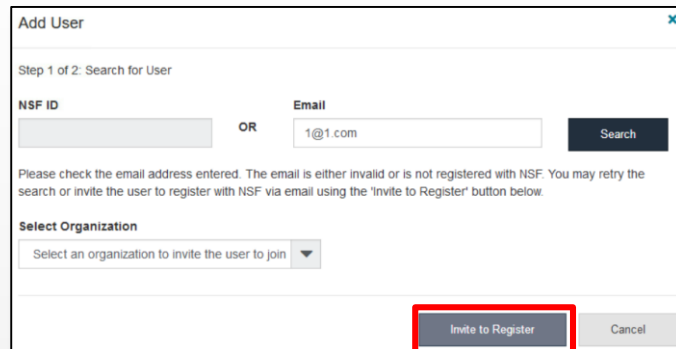


Figure 10

How do I remove a user from my organization?

- Locate the “**Manage User Roles**” table. (Figure 11,12)
- Click “**Remove User**” located in the Action column. (Figure 11 shows a user who has migrated to the new account management system and Figure 12 shows a user who has not migrated to the new account management system)

A user cannot be removed if they are the last or sole Administrator.

- A user cannot be removed if they are the current Coordinating Official (CO). This CO role must be assigned to another user before removing the user.
- Successfully removing the user will remove the user from the organization but not from NSF’s system.
- Removing a user from the organization does not in any way impact the user’s NSF account or that user’s ability to become affiliated with any other organization.
- Click “**Remove User**.” (Figure 13)

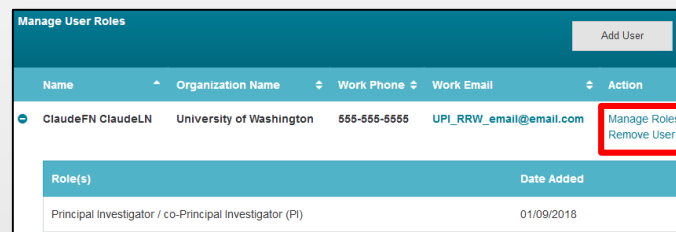


Figure 11

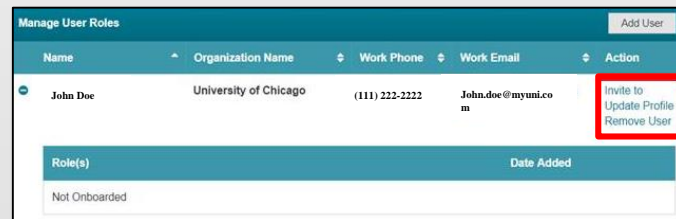


Figure 12

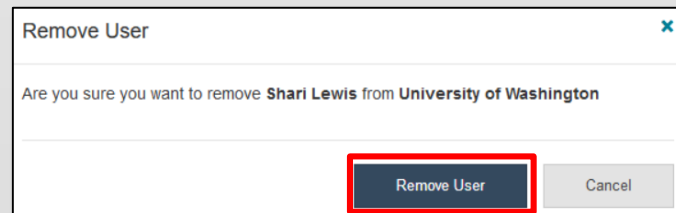


Figure 13



Helpful Tip

To add a user to an organization or to add a roles to a user, the user must have an updated profile. A user can only update their profile if they have successfully migrated their account and updated their primary email address and phone number.



Migrate Your Existing NSF Account



To migrate your existing NSF account to NSF's new account management system, you must verify your account's primary email address and phone number. If you created your NSF account before March 23, 2018 and your email address is associated with more than one NSF account, you will be prompted to verify information. Depending on the information on file, you may be required to contact the NSF IT Help Desk for assistance.

How will the system prompt me to verify my information so that my account can be migrated?

- You will receive a Verify Your Information pop-up. After you have read it, click “**Next.**” (Figure 1)
- Select an email address, enter your 10-digit phone number, and click “**Next.**” (Figure 2)
- Note the information that has been saved as your account's primary email address and phone number. (Figure 3)
- Click “**Go to View My Roles**” and you will be directed to the View My Roles page to view current active roles for your organization(s). (Figure 3)



Helpful Tip

For instructions on how to make changes to your account profile information after your existing NSF account has been migrated to NSF's new account management system, please refer to the [View and Edit My NSF Account Profile Information](#) job aid.

Verify Your Information

NSF is updating its account management system and we need you to verify your account information. This is a one-time process.

On the next screen, you will be asked to review your account's primary email address and phone number.

If you have questions, please contact the NSF IT Help Desk at 1-800-381-1532 or rgov@nsf.gov.

Next

Figure 1

Verify Your Information

Please verify your primary email address and phone number. After this one time verification process, you will be able to make future updates to this account information in My Profile.

Charles A Bobrow-Strain (NSF ID: 000300002)

* Required

* Primary Email ⓘ

Select One

* Phone Number

Next

Figure 2

Verify Your Information

☒ Your account information has been verified and saved successfully. This information can be updated as needed in the My Profile page.

Charles A Bobrow-Strain (NSF ID: 000300002)

Primary Email: cabs@socrates.berkeley.edu

Phone Number: 5555555555

Please proceed to the View My Roles page to ensure you have the correct roles(s). If changes are needed, you will now be able to request a new role.

Go to View My Roles

Figure 3



What happens when the system prompts me to verify my information but tells me I have multiple accounts that need to be reconciled?

- You will receive a Verify Your Information pop-up. After reading, click **"Next."** (Figure 1)
- The "Multiple Accounts Found" pop-up informs you that your email address(es) is associated with more than one NSF ID. (Figure 4)
- Click **"Go To My Desktop."** (Figure 4)
- **Important Note:** Please be aware that the system will allow you to access My Desktop functionality for an allotted grace period. NSF has set the grace period initially to 30 days.

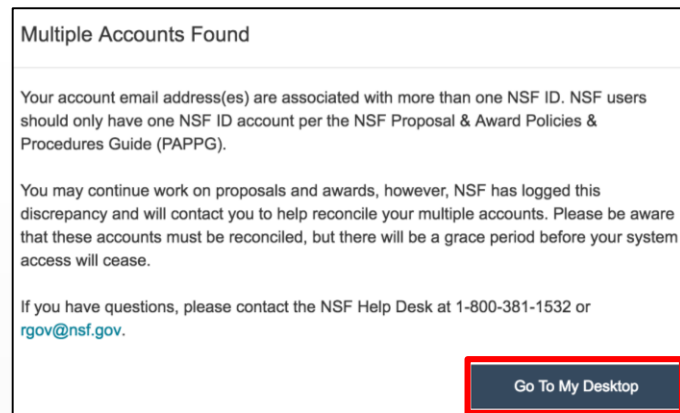


Figure 4

My grace period has expired. What do I do?

- You will receive a Verify Your Information pop-up. After reading, click **"Next."** (Figure 1)
- The "Multiple Accounts Found" pop-up informs you that an update to your account is required in order to restore service. (Figure 5)
- This pop-up will appear each time you sign in until you contact the NSF IT Help Desk to reinstate your access to NSF systems. (Figure 5)
- Click **"Close."** (Figure 5)

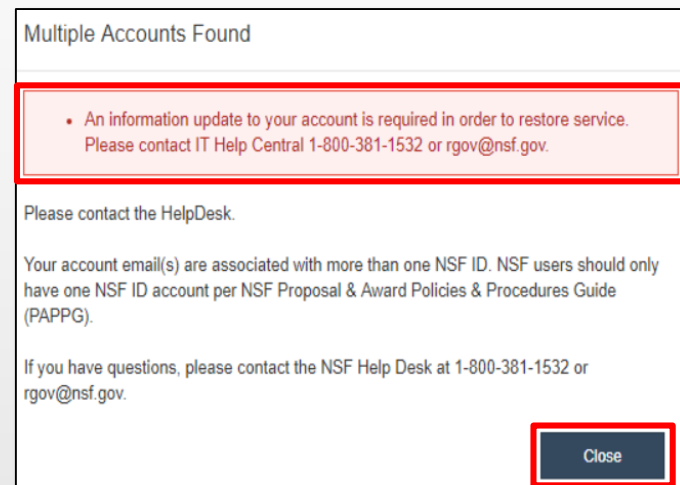


Figure 5

The system is telling me that my email address is not in the correct format. What do I do?

- You will receive a Verify Your Information pop-up. After you have read it, click **"Next."** (Figure 1)
- Notice the "Account Verification Failure" pop-up informing you that your email address(es) is in an invalid format. (Figure 6)
- You must contact the NSF IT Help Desk to address this issue. (Figure 6)
- Click **"Close."** (Figure 6)

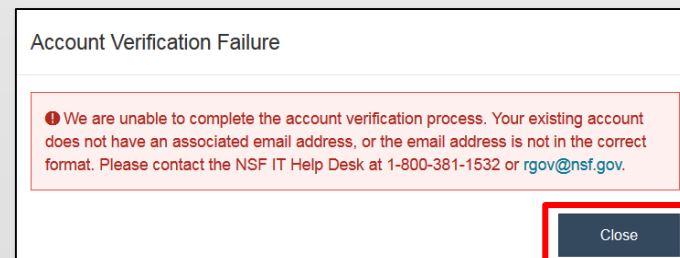


Figure 6